admin, admin essential, staff records, webinar wednesday, staff info, staff assignments, student dashboard

## Staff: Support Staff Oversight Setup

There is now an updated method of tracking staff positions and staff that oversee other staff. With this update, searching for staff members that "belong to me" becomes easier too.

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## Part I. Create Position Titles

1. Go to any staff member's dashboard and click on the Job Class/Assignments tab.

|    | Admin       | Repo                          | rts Schools                           | Teachers                | Portal Help          |               |     |          |                |                  |                    | Type to qu | uick page find       |
|----|-------------|-------------------------------|---------------------------------------|-------------------------|----------------------|---------------|-----|----------|----------------|------------------|--------------------|------------|----------------------|
|    | Search      | Lini St                       | al Info Employment                    | Job Class / Assignments | Credentials / NCLB   | Notifications | Das | board    |                |                  |                    |            |                      |
|    | Staff I     | Dashbo                        | ard                                   | F                       | r staff member: Asht | on, Taryn     | ,   | Displa   | 7              |                  |                    |            | Instructor           |
|    | 1           | 1                             | Taryn Ashton                          |                         |                      | 🌣 🍠 🔮         | 0   | You have | e 5 notificati | ions!            |                    |            | ୍                    |
|    | A A         | IF L                          | Local ID 4177<br>Staff Tune Teacher I | CB (The S)              | Staff Number 10      | 1             |     | Assign   | d Students:    | (/None)          |                    |            | ୍                    |
|    | 10          | 20                            | Gender F                              | co (ino)                | Birthdate 05/20/2    | 2015          |     | Curr     | ent            | Pre-Registration | 0                  | Nsenrolled |                      |
| 2. | Click       | to Edi                        | it Position                           | Titles                  |                      |               |     |          |                |                  |                    |            |                      |
|    |             | Tary                          | n Ashton - J                          | ob Classificati         | ons & Non-C          | lassroor      | n A | ssign    | ments          |                  |                    |            |                      |
|    | 1           | test, CA                      | A test                                | Staff Number<br>101     | Contact Pho          | ine           | W   | ork E-Ma | 1              | Gender<br>F      | Job Classification | •          |                      |
|    |             |                               |                                       |                         |                      |               |     |          |                |                  |                    |            |                      |
|    | List of Job | Classificati<br>w job classif | ons / Assignments<br>lication         |                         |                      |               |     |          |                |                  |                    |            | Edit Position Titles |

3. If you don't have any Position Titles or want to add new, click the Add Staff Position Title link.

| Edit Staff Position Titles |                           |                           |       |                       |        |      |
|----------------------------|---------------------------|---------------------------|-------|-----------------------|--------|------|
|                            |                           |                           |       | Se                    | arch:  |      |
| Position Title             | <ul> <li>Count</li> </ul> |                           | t Asc | signable to Student 🕴 | Hidden | Edit |
| 504 Case Manager           | 2                         | Brown, Elizabeth          | Yes   |                       | No     | Edit |
| 504 Coordinator            | 1                         |                           | Yes   |                       | No     | Edit |
| Attendance Clerk           | 4                         | Roes, Scott               | Yes   |                       | No     | Edit |
| CB Lead Teacher (9-12)     | 1                         |                           | No    |                       | No     | Edit |
| CB Lead Teacher (Tk-8)     | 2                         |                           | No    |                       | No     | Edit |
| Compliance & Archiving     | 1                         | Roes, Scott               | No    |                       | No     | Edit |
| Counselor                  | 2                         | Childers, Cheree Danielle | Yes   |                       | No     | Edit |

If you used staff titles in the deprecated version of the employment tab, you will get a list of the titles you've used in the list (as shown above).

- 1. Add the Position Title
- 2. Who the supervisor of the position is
- 3. If it should be hidden from view for future use
- 4. Check if the position can be assigned to a student. **THIS IS VERY IMPORTANT FOR LATER USE!**
- If you have job titles you do not want to use anymore, you can EDIT and then DELETE them. If a deleted title has staff members "attached" it will ask you what Position Title you want to move them to.

# Part II. Setting up staff with Position Titles and staff oversight.

1. Go to any staff member's dashboard and click on the Job Class/Assignments tab.

| Elizab                      | eth Brown - J   | ob Classificatio     | ns & Non-Clas | sroom Assignm   | ents        |                                |               |        |
|-----------------------------|-----------------|----------------------|---------------|-----------------|-------------|--------------------------------|---------------|--------|
| са .                        | Stat<br>123     | ff Number<br>3234361 | Contact Phone | Work E-Mail     | Gender<br>F | Job Classification             |               |        |
| List of Job Classifications | : / Assignments |                      |               |                 |             |                                | Edit Position | Titles |
|                             |                 |                      |               |                 |             | Search:                        |               |        |
| Job Classification          |                 | † Finish † Positi    | ion Title 💠   | Supervisor      | ♦ % FTE ♦   | Non-classroom based assignment | ÷ Edit        |        |
| Pupil services              | 07/01/2012      | SPED Adm             | nin Childers, | Cheree Danielle | 100%        |                                | Edit          | 0      |

- 2. Click to Add a new job classification or edit the current one.
- 3. The "job Classification" and FTE % as well as the non-classroom-based assignments (if not a teacher) are VERY important to CALPADS. These must be completed even if you don't set up position titles for your staff.

|  | 234301                  |                      |   | F      |  |
|--|-------------------------|----------------------|---|--------|--|
| Job Classifications and Non-Classroom          | Assignments             |                      |   |        |  |
| Job Classification: Pupil services             | •                       | Position Title: S    | PED Admin                               | *      |  |
| TE Percentage: 100 %                           |                         | Supervised By:       | hilders, Cheree (Teacher IS K-12)       |        |  |
| Start Date: 07/01/2012                         |                         | End Date:            |   |        |  |
| Exclude from state reporting:                  |                         |                      |   |        |  |
| This staff member has non-descence based assim | mante select any from b | alow that fall under | this ish description. Click Dava scheme | . does |  |

- 4. You can add more than one position title. You may have a staff member that is a part-time teacher and a part-time administrator. Add both positions if so with the proper percentage of FTE. The FTE for multiple positions can only add up to 100% or CALPADS will give you an error. If you have more than 100% FTE, you may also want to exclude one from reporting to CALPADS.
- 5. Once all position titles are set, you will be able to search by position title on the Staff List.

| te<br>12/16/2016 Today           |
|----------------------------------|
| 12/16/2016 Today                 |
| and a second                     |
| 12/16/2016 thru 12/16/2016 Today |
| School Year 2016 - 2017 V        |
| sition                           |
| I Positions                      |
| 1                                |

#### and see the titles listed on the staff list.

| Sel 🔺 | Name ? 🛛 🔶         | Position  | ) ID ≑ Number ≑         | LC | Started  |
|-------|--------------------|---|-------------------------|----|----------|
|       | ⊖Adale, Joe M      | Counselor   | 4173 123234362          |    | 12/07/20 |
|       | eAlphin, Katherine | Tutor   | 4227 123234387 Tutoring |    | 06/06/20 |
|       | ⊖April, Zenger     |   | 4230 123234390          |    | 10/18/20 |
|       | ●Ashton, Taryn     | Teacher CB (Tk-5)   | 4177 101 Region 1       |    | 07/01/20 |
|       |                    | THE REPORT OF THE |                         |    |          |

## Part III. Set staff oversight to students

1. For any student, go to the Support Staff tab. Click the Add new support staff \*.

\*Note: This is NOT for primary teachers or homeroom teachers. Primary and homeroom teachers are still assigned in their respective areas (either in the **IS Staff Assoc** tab or as a Homeroom Teacher of a CMS Class). An example of who might be assigned as a Support Staff is a Counselor.

Position titles of EL Coordinator, 504 Coordinator, 504 Case Manager, Nurse, SPED SAI Provider, Speech Therapist, Case Manager, Occupational Therapist, SPED Administrator, School Counselor, and Psychologist, are set in Special Accommodations tab OR the respective areas of enrollment.

| Admin  | R     | eports       | Schools        | Teachers      | Portal         | Help         |        |     |     |                         |             |                |             |               |         | lick page | find   |
|--------|-------|--------------|----------------|---------------|----------------|--------------|--------|-----|-----|-------------------------|-------------|----------------|-------------|---------------|---------|-----------|--------|
| Search | List  | Registration | Enrolment      | Support Staff | IS Staff Assoc | Discipline   | Classe | ма  | Med | Special Programs/Accomm | TOMS        | Sports/Clubs   | Tests       | Transcripts   | Cume    | Profile   | Dashbo |
| Studen | nt Da | shboa        | rd 🔍           |               |                |              |        |     |     |                         |             |                |             |               |         |           |        |
| * 🖬 🖻  |       | 5/           | MANTHA ATH     | UNS Grade: 9  | Age: 14        |              |        |     | KA  | THLEEN BRENNEMAN        | Independe   | nt Study       |             |               |         |           |        |
| \$0.00 |       |              |                |               |                |              | × -    | - 0 | 50  | aff Association History | •           |                |             |               |         |           | 1      |
|        |       | S            | SID            |               | Legacy I       | D None       |        |     | 50  | aff Member              | Position 1  | Title          | Start       |               | Finish  |           | Mig    |
|        |       | 0            | cal ID 78899   |               |                |              |        |     | Bre | enneman, Kathleen       | Teacher     |                | 07/18/20    | 016           | present |           |        |
|        |       | G            | ender F        |               | Birthdat       | e 02/12/2002 | 1      |     |     | File Mig                | ration: Has | no RW file ass | ociated. PL | 5 start: 07/1 | 1/2016  |           |        |
|        |       | н            | ome Phone /530 | 1 249 3333    | Studard        | Call         |        |     | _   |                         |             |                |             |               |         |           |        |

As an example, you can set a counselor in the Support Staff area OR the Counseling Area. Setting it in one area will link it to the other.

| Student Support Staff       |   |    |                    | /                     |                               |
|-----------------------------|---|----|--------------------|-----------------------|-------------------------------|
| Add new support staff       |   |    |                    | /                     |                               |
| 0                           |   |    |                    |                       |                               |
| Support Staff               | Position Title                          |    |                    | /                     |                               |
| Adale, Joe M                | Counselor                               |    |                    | /                     |                               |
| Parker, Butch               | Attendance Clerk                        |    |                    | /                     |                               |
| Showing 1 to 2 of 2 entries |   |    |                    |                       |                               |
|                             |   |    |                    | Current Assigned      | Staff                         |
|                             | Counseling Session Log                  | 0  | ounselor 🤞         | Adale, Joe            | 07/11/2016 - Current          |
|                             | emic                                    | P  | sychologist 🥖      | Not Yet Assigned      |                               |
|                             | er                                      |    | Stu                | dent Information as o | f 05/28/2017                  |
|                             | mal/Emotional                           |    | School             | Milestone Academy     |                               |
|                             | ing for next School Year Homeless Youth |    | Sites              | Milestone Independent | t Study Program (Grades 9-12) |
|                             | emic Goals Re-enrolling/Re-Instated     |    | Student            | Atkins, Jordan        |                               |
|                             | r Advising Dual Enrollment              |    | Special Programs:  | * *                   |                               |
|                             | New students                            | SL | pervising Teacher  | Brenneman, Kathleen   |                               |
|                             |   |    | Contact Specialist | Deever LeAnn (leann)  |                               |

This type of duality is used in all Special Program areas: 504, SPED, EL, and Counseling

## Part IV. Student List

The Student List can be used to search for students linked to staff positions or specific staff. For Instance, I can change the "Staff Position" field to **504 Case Manager** and get a list of students assigned to any 504 case manager. If I want a more specific list, I can also use the **staff name** field to pick a specific staff member with the **504 Case Manager** title and the list will populate only

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#### his/her list of students.

| ✓ Filter Options<br>Last Name |    | First Name                                    |   | Middle Name                         |
|-------------------------------|----|---|---|-------------------------------------|
| Email Address                 |    | Local ID or State ID                          |   | Grade                               |
| Birthdate                     |    | Special Program 0 Selected (defaults to none) | * | Actively Enrolled                   |
| Primary Class Offering        |    | Education Program                             |   |                                     |
| 12 Selected (defaults to all) | *  | 19 Selected (defaults to all)                 | * | 05/28/2017 thru 05/28/2017 Today    |
| Staff Position                |    | Staff Supervisor                              |   | School Year 2017 - 2018             |
| Any Position                  | *  | Any Staff Supervisor                          | * | Ignore Dates (include all students) |
| Staff                         |    |   |   | Track                               |
| - Al Staff -                  | Ψ. |   |   | All Tracks                          |

## Part V. PLS Student Roster Oversight.

When choosing how to filter on the PLS Student Roster, you can now choose three methods depending on your permissions and staff position. Teachers will automatically have their students revealed when they login. Two other options are **Supervised By** and **Assigned As**.

#### **Supervised By:**

If a staff member is set up to oversee multiple **teachers**, when they access the PLS roster they will have access to the new *Supervised By* field. In the *Students For* field, only the teachers they supervise will be listed. This allows them to see the students their teaching staff oversee. If Mr. Smith oversees 10 teachers, when he goes to the PLS Student Roster, he will only see his 10 teachers in the drop-down of staff. Permissions like this will have to be done for each individual school as each school might use this differently.

| Roster Options             |   | Reset to defaults                         |
|----------------------------|---|---|
| Schoolyear:                | 2016 - 2017 •                                       |   |
| Schooltrack:               | All T   |   |
| Date Range:                | Track A: Semester 1 (Fall) (07/<br>From: 07/18/2016 | 18/2016 - 12/16/2016) •<br>To: 12/16/2016 |
| Supervised By:             | Tatum Treacher (IS Regional A                       | dministrator) 🔹                           |
| Show students belonging to | : All   |   |
| Course:                    | Homeroom  | <ul> <li>(Upload Work Samples)</li> </ul> |
| Print Options              |   |   |

#### Assigned As:

If you have a position title to oversee students of a primary teacher, your position title will be available in the PLS Roster. By choosing your title, you will see teachers in the **Students For** field. Choose a teacher to view their roster of students..

| Roster Options                   | Reset to default |
|----------------------------------|------------------|
| Schoolyear: 2016 - 2017 T        |                  |
| Schooltrack: All 🔻               |                  |
| Date Range: Filter By Date Range | T                |
| From: 07/03/2017                 | To: 07/03/2017   |
| Supervised By: All               | •                |
| Assigned As: Attendance Clerk    | •                |
| Students For: Select             | •                |
| Print Options                    |                  |

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